

A Physician Staffing Firm from the United States.  
**Zoho CRM, Zoho Creator, Zoho Analytics**

● **Project Duration:** 1 Month

● **Users:** 13

● **Project Scope:**

Implementation of Zoho CRM, Zoho Creator, Zoho Analytics.



## Problem Descriptions

The client engaged us to improve their Zoho CRM application to automate complex processes in the system. They required comprehensive reports to monitor every aspect of their sales life cycle.

## Solution Approach

Our senior solution architects conducted a gap analysis of the processes that were already implemented in Zoho CRM by another Zoho consultant.

Implemented automation features for simplifying complex lead management SOPs, Integrated lead management with the submittal process, Implemented the conversion functionality for the transition of records from leads to contacts(people) module, improvements of deals module, Employment relations module, Implemented Zoho Marketing Automation, KPI reports for sales performance evaluation, Blueprints for Leads, Contacts and Deals module to ensure validation of input data, task automation, expense module automation using Zoho Creator, automation of timesheets, creation of commission module with automation and Credential module automation.

## Customer Experience

The client had a pleasant and interactive experience with us, due to consistent support from multiple developers and project managers for over 18 months. They have acknowledged positively to our commitment to timely resolution of issues.

## Outcome

We documented the Standard Operating Procedures for the client. They were able to establish process and blueprint paths to guide their users for efficient usage. By thus, minimizing redundancy and errors in the data.

## Contact Us



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